Michigan Treasury Online (MTO) Optimization

Learning Series 4: Manage Business Account Functions

NOTE: These documents are for demonstration purposes only and are not actual accounts or taxpayers.

January 2016

Customer Friendly

Simplified Process

What's New in MTO?

- **Functions of Manage Business Account User Role**

Learning Series 4 edition on the Functions of Manage Business Account.

Before continuing, please spend a few minutes becoming familiar with the images used in this Learning Series:

Image	Purpose
	To indicate a change in process or functionally that is expected to significantly increase the user experience
	To indicate a reminder or a relevant note within a text
	To indicate a quick tip or faster way of completing an action
1	To number steps on screenshots
	To highlight any part of the screenshot, such as a button
Access Types	To draw attention to a relevant section of information/text (not a button)

Manage Business Account Information:

Manage Business Account Information – full manage rights that includes Registration functions and File and Pay SUW return functions. This role allows a user to add and update registration information along with the ability to file, pay, amend, view and print previously filed return. With the manage business account user role, the user has the ability to navigate through the *Manage Business* menu, the *File and Pay SUW* menu, the *Other Payment Options* menu, and the *Letters and Licenses* menu.

- Within the Manage Business menu, you can complete the following transactions:
  1. Change taxpayer data (business name, phone number, number of locations, and tax year end)
  2. Add and update business addresses (legal, physical, location, and mailing)
  3. Add and update representatives (payroll service provider and power of attorney)
  4. Add and update owners, officers, or partners
  5. Add and update tax types
  6. Submit an EFT application for MBT, CIT, and FTW taxes
  7. View delegates
  8. Discontinue the business
  9. Track registration updates

Taxpayer Data:

This page allows a user to update taxpayer data such as the business name, business ownership type, business code (NAICS), business phone number, number of locations and tax year end.

Addresses:

This page allows a user to view, edit, update and delete addresses relating to the business including legal address, mailing address, physical address, and location(s) address.

Representatives:

This page allows a user to designate and edit/update designated representatives (including payroll service provider and power of attorney) who can discuss tax matters with the Department of Treasury on behalf of the business.

Owners, Officers & Partners:

This page allows the user to add, delete and edit an owner, officer or partner of the business.

Tax Types:

This page allows a user to add a new tax type and discontinue an existing tax type.

Electronic Funds Transfer (EFT) Debit Application:

This page allows a user to electronically complete an application for Electronic Funds Transfer (EFT) Debit. There is also a link to the paper Credit EFT application. Both of these applications are for MBT, CIT and FTW taxes.

Manage Delegates:

This page allows a user to view all users who have established a relationship with the business.

Discontinue Business:

This page allows a user to discontinue the business electronically.

Track Updates:

This page displays the changes made within the manage business menu after March 1, 2014. A user can view the confirmation number, date submitted, status and PDF displaying the change made.

⚠️ **Note: Any changes made to information within the Manage Business menu are not saved until the Submit button has been selected.**

- Within the File and Pay SUW menu, you can complete the following transactions:
    1. File and Pay a SUW Tax Return
    2. Amend and Pay Processed SUW Tax Returns
    3. View and Print Filed Returns

File and Pay a Tax Return:

The returns that are required to be filed by the business are displayed on the File and Pay a Tax Return page. The "Additional Returns" button is also available on this page. This function allows a user to file an additional monthly/quarterly or annual return, if needed.

Amend and Pay Processed Return

Displayed on this page are previously filed and processed sales, use and withholding tax returns. This page allows the user the ability to view, amend, or make a payment on these returns displayed. The "Additional Amended Returns" button is also available on this page. This function allows a user to file an additional monthly/quarterly or annual return, if needed.

View and Print Filed Returns

Returns that have been filed for the business for sales, use and withholding are displayed on this page. The user can view and print these submitted returns.

- Within the Other Pay Options menu, you can complete the following transactions:
    1. Make a Payment
    2. Manage Payments
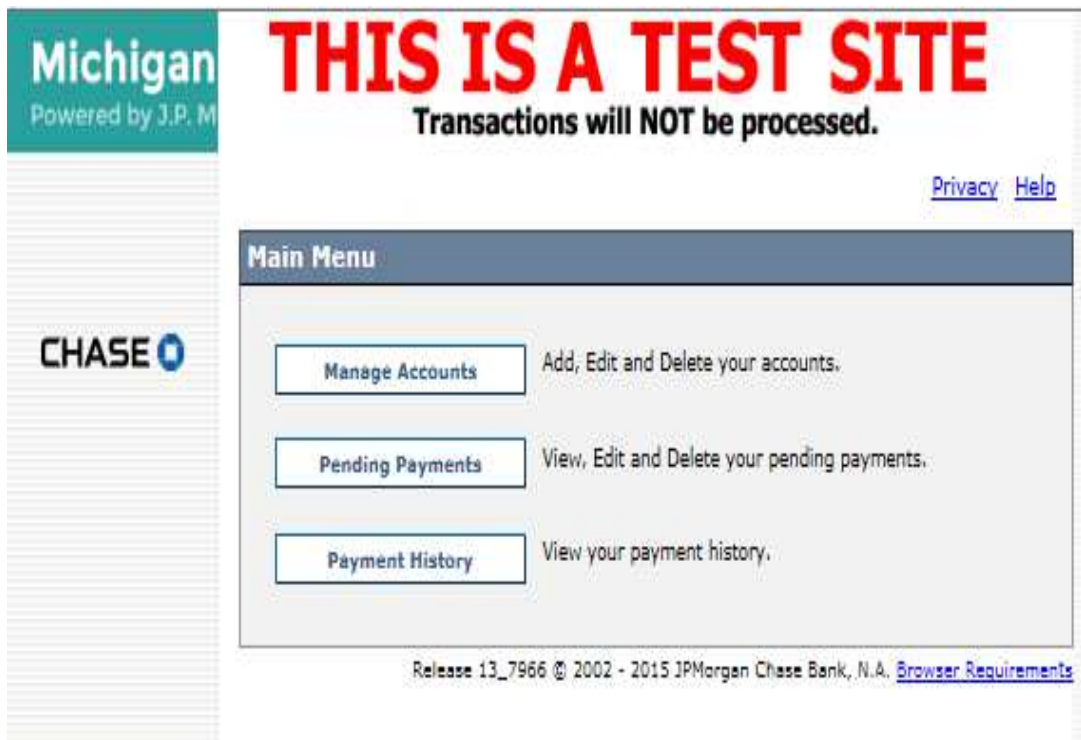   3. Payment history

Make a Payment

This page allows a user to make an additional electronic payment by having the user input the payment amount by tax type and selecting the tax period the payment should apply to. Additionally, there is functionality on the page that allows the user to print a payment voucher to pay by check.

Manage Payments:

This directs the user directly to the payment center site. The user has the ability to manage their account, view and manage pending payments, and to view EFT payment history.

Payment History:

All sales, use and withholding payments (both check and EFT) received for the business are displayed on this screen.

Letters and Licenses

Within the Letters and Licenses menu, you will be able to view correspondence from the Michigan Department of Treasury along with a copy of the businesses sales tax license.

Contact Us

If you have additional questions that were not answered using this Learning Series, please call the Michigan Department of Treasury at 517-636-6925.

The MTO Business website is currently being revised to include updated information on MTO and the changes to SUW that will begin in January. The website can be accessed here: www.michigan.gov/mtobusiness.